. . . . . .

Class Specifications
for the Class:

SUPERVISING TAX CLERK II

Class Distinguishers:

Complexity: This class reflects responsibility for supervising tax licensing and clearance operations in the State's principal taxation district. Activities supervised include processing, issuing and renewing tax licenses; processing and issuing tax clearances, including the more complex tax clearance requests which involve out-of-state taxpayers with State/county government contracts, and bulk sale or transfer of a business or property; providing informational taxpayer services related to general excise, withholding, use and miscellaneous tax laws, rules and regulations; and providing general tax information and issuing tax forms to the public. The work of the position involves supervising and coordinating tax licensing and clearance activities performed by a staff of technical and clerical positions; assigning, monitoring, reviewing and evaluating work, and training and advising subordinates; resolving problems related to tax licensing and clearance matters; participating in the planning and coordinating of joint tax licensing and clearance activities with the Internal Revenue Service and other State agencies; conducting workshops on tax licensing and clearance requirements for tax preparers and special interest groups; and serving as resource for district office personnel, State agencies, and others, for tax licensing and clearance procedures.

Personal Contacts: Personal contacts include attorneys, certified public accountants, tax preparers, business representatives and the general public in responding to inquiries related to general excise, withholding, use, and miscellaneous tax requirements; departmental district office personnel on tax licensing and clearance procedures; and personnel of the Internal Revenue Service and other State agencies on joint tax licensing/clearance matters.

Supervision Exercised: The sole position in this class supervises a staff of technical and clerical positions.

Supervision Received: The position works under the general supervision of the branch chief, with wide authority and responsibility for executing the programs of the section, but consulting on highly complex or sensitive issues.

Full Performance Knowledge and Abilities: *(Knowledge and abilities required for full performance in this class.)*

Knowledge of: State tax laws, rules and regulations, pertaining to general excise, withholding, transient accommodations, rental motor vehicle and tour vehicle, use and miscellaneous (e.g., fuel, liquor, cigarette and tobacco) taxes, and filing requirements;

State tax licensing and clearance operations and activities; State tax forms and general filing requirements; departmental operations, rules and regulations; office practices and procedures; standard English communication skills to speak, read and write effectively; arithmetic; and principles and practices of supervision.

Ability to: Plan, direct, and coordinate tax licensing and clearance activities; understand and apply general excise, withholding, use and miscellaneous tax laws, rules and regulations; recommend and implement changes in workflow procedures; train and advise others in general excise, withholding, use and miscellaneous tax requirements; resolve problems related to tax licensing and clearance matters; compute tax liabilities, penalties and interest; prepare correspondence; deal tactfully and effectively with others; communicate effectively orally and in writing; and supervise the work of others.

Examples of Duties: *(The sole position in this class may not be assigned all of the duties listed, nor do the examples necessarily include all the duties that may be assigned. The omission of specific statements does not preclude management from assigning such duties. The classification of a position should not be based solely on the examples of duties performed.)*

1. Plan, direct, coordinate and supervise the work of subordinates involved with processing, issuing and updating general excise and miscellaneous tax licenses and permits; processing and issuing of tax clearances; and providing informational taxpayer services for tax licensing and clearances and general tax filing requirements, and issuing all tax forms.

2. Participate in planning and coordinating of joint tax licensing and clearance activities with the Internal Revenue Service and other State agencies (e.g., DLIR, DBEDT, and DCCA).

3. Interview and assist taxpayers who are not in agreement with determinations made by subordinates in matters related to confidentiality laws, tax clearance procedures and issues, and provisions of the general excise, withholding, use and other miscellaneous tax laws.

4. Review all outgoing correspondence written by subordinates for accuracy and completeness.

5. Train and advise subordinates in new and amended tax laws, rules, regulations, procedures and forms pertinent to tax licensing and clearance requirements.

6. Monitor and evaluate the work of subordinates to ensure dissemination of reliable and accurate information, and prompt and courteous services.

7. Resolve problems referred by subordinates, and respond to taxpayer inquiries, orally or in writing, as necessary.

8. Conduct workshops on tax licensing and clearance requirements for tax preparers and special interest groups.

9. Serve as resource to department district office personnel, and other State agencies on matters related to licensing and tax clearances procedures.

10. May train others participating in joint tax licensing and clearance activities, in tax licensing and clearance requirements and procedures.

11. Maintain production records of taxpayer services; and oversee and direct the compiling and printing of monthly, calendar year and fiscal year statistical reports for the branch.

12. Maintain an inventory and distribute all State tax forms.

13. Provide input to the branch chief for budget and manpower needs; and recommend improvements to workflow procedures of the section.

- - - -